PROPOSAL WRITING

FOR THE

PROJECT MANAGER

Presenter

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The Most Interesting Man in the World

Disclaimer

This presentation is not intended to be a comprehensive program covering all aspects of this topic. All technicians are encouraged to read and follow all applicable standards, codes and regulations related to this topic.

✓ It is the responsibility of each individual contractor to follow local building codes and licensing requirements and to work safely in accordance with OSHA guidelines.

✓ It is the contractor's responsibility to take proper precautions on each project to prevent cross contamination. Always take the health and safety of the building occupants into consideration before you conduct any cleaning procedures.

✓ All of the following tips are only general tips. They do not cover every situation and it is your responsibility to adapt these tips to the individual system you are working on.

✓ The Instructor is not responsible in any way for the work you perform after viewing this slide show. You are responsible for your own work.

✓ The views and opinions following are the instructors opinions and not necessarily the official position of the National Air Duct Cleaners Association.

What We'll Learn

- Project Proposals contain key information about the project.
- A Project Proposal is generally drafted during the early phases of a project (before detailed plans are made and resources are allocated).
- SIZE Project proposals do not follow the 'one size fits all' principle.
- A Project Proposal is **NOT A CONTRACT!**

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Presentation Content

- Introduction
- Issues - Needs
- Goals - Objectives
- Procedures - Scope of Work
- Schedule - Timetable
- Budget - Proposal
- Key Personnel
- Evaluation
- Endorsements - References
- Appendix

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INTRODUCTION

Begin by explaining how and why your company was founded.
It is also a good idea to provide a *mission statement* so that your customers know who you are and what you do.

INTRODUCTION

Your introduction can include information such as;

- the purpose of your organization
- a description of the services you provide
- a description of your target customer
- evidence that your company is healthy

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ISSUES - NEEDS

Identify the problems to be addressed. Include photographs and any documentation that you may have. Ideas for information to include here are:

- Length of time problems have existed
- Whether problem has ever been addressed before, and what was accomplished
- Impact of problem to occupants
- Impact of problem to building

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GOALS - OBJECTIVES

State the desired goals and objectives to address the needs/problems stated above. Also include key benefits of reaching goals/objectives.
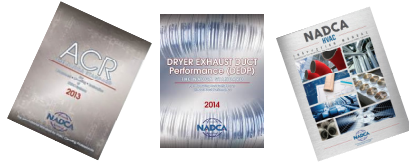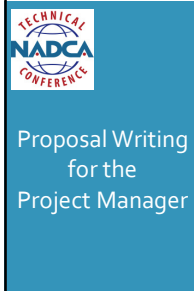
- Specific & measurable goal 1
- Specific & measurable goal 2
- Specific & measurable goal 3

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Slide 1

PROCEDURES - SCOPE OF WORK

Provide detailed information about proposed procedures, if available, and the scope of work. Include information on activities such as recruiting, training, testing, and actual work required.

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Slide 2

SCHEDULE - TIMELINE

Provide detailed information on the expected timetable for the project. Break the project into phases, and provide a schedule for each phase.

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	Description of Work	Start and End Dates
Phase One	Decontamination	
Phase Two	Surface Preparation	
Phase Three	Relining	

Slide 3

SCHEDULE - TIMELINE

You can also use a Gantt chart for more detailed project timetable:

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ACTIVITY	IMPLEMENTATION TIME			RESPONSIBILITY
	Month 1	Month 2	Month 3	
1. Design and implement training program for project management	XXXXXX			Program Manager (PM)
1.1. Conduct needs assessment		XXXXXX		Consultant
1.2. Design training modules			XXXXXX	Consultant
1.3. Conduct training			XXXXXX	Consultant
2. Improve procedure for project management	XXXXXX	XXXXXX	XXXXXX	Program Manager
2.1. Conduct management audit of current procedures		XXXXXX		Consultant

BUDGET - PROPOSAL

State the proposed costs and budget of the project. Also include information on how you intend to manage the budget.

	Description of Work	Budget
Phase One	Decontamination	
Phase Two	Surface Prep	
Phase Three	Relining	
	Total	$ 0.00

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KEY PERSONEL

List the key personnel who will be responsible for completion of the project, as well as other personnel involved in the project.

Customer	[name]
Point of Contact	[name]
Project Manager	[name]
Team	[name], [name], [name], [name]

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EVALUATION

Discuss how progress will be evaluated throughout and at the end of the project.

- Formulate clear indicators for each objective and result
- Indicate how and when to conduct monitoring and evaluation activities to determine project's progress and outcome

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EVALUATION

Discuss how progress will be evaluated throughout and at the end of the project.
- State which methods will be used to monitor and evaluate the project
- Identify who will carry out the project…

Evaluation
- ☑ OUTSTANDING
- ☐ Excellent
- ☐ Very Good
- ☐ Average
- ☐ Below Average

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ENDORSEMENTS - REFERENCES

Provide the names and addresses of individuals and company references and those who support and endorse the project.

- ☑ Excellent
- ☐ Good
- ☐ Average
- ☐ Poor

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APPENDIX

Provide supporting material for your proposal here. It may be:

- Company history
- Research materials
- Statistics or estimates
- Subcontractor quotes
- Detailed cost / benefit spreadsheets
- Other relevant information or correspondence.

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Conclusion

- Brief identification and purpose of your organization
- The purpose and anticipated end result of this proposal
- The type and amount of support requested
- The total anticipated budget
- Other information you deem pertinent

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**Thank you
for
Participating
in the
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